

CastleBranch Checklist 2023

The following is a checklist intended to help you to keep track of all CastleBranch requirements needed for clinical rotations, including target dates to complete each requirement. Unless otherwise indicated, you may complete these items any time (i.e. tasks listed for July may be completed early in June). More information can be found on the [General On-Boarding Requirements](#) page of the BMS Labs website.

NOTE: The TB Test and Drug Screen must be completed within 90 days of clinical start date for those rotating with Froedtert Health

Tasks to complete in June

- Create CastleBranch account** – this should be completed no later than **June 16th**. The cost of your account includes a background check, requirement tracking, and a drug screen. You will receive a form from CastleBranch with directions on how to complete the drug screen at a Quest Diagnostics location – you should save this form and plan to complete the drug screen in August. See the [CastleBranch](#) page of the BMS Labs website for instructions to create an account.
- Complete and upload the Handbook Acknowledgment Form to CastleBranch** - this form can be downloaded from the [General On-Boarding Requirements](#) page on the BMS Labs website, and should be uploaded no later than **June 30th**
- Complete and upload the Background Information Disclosure (BID) form to CastleBranch** – this form can be downloaded directly from your CastleBranch Account, and should be uploaded no later than **June 30th**
- Complete and upload the Background Check Release Authorization Form to CastleBranch** – This form can be downloaded from the [General On-Boarding Requirements](#) page on the BMS Labs website, and should be uploaded no later than **June 30th**
- Obtain available vaccination records for the following and submit to CastleBranch** – this should be completed no later than **June 30th**. If all records are contained in one document, you should upload that same document to each appropriate spot on CastleBranch. CastleBranch will review your files, and will notify you if they require additional testing or vaccinations. If any are identified as inadequate, they will tell you what you need to do, and you should schedule additional vaccinations or titer testing as soon as possible, or during your physical examination.

Vaccination records checklist for JUNE:

Requirement Name	Uploaded to CastleBranch?	Needs additional vaccination/titer testing?
Measles, Mumps, & Rubella		
Varicella (Chicken Pox)		
Hepatitis B		
Tetanus, Diphtheria & Pertussis (TDaP)		
COVID-19		

Tasks to complete in July (These may also be completed in June, unless specified below)

- Complete and upload the Health Records and Student Files Release Authorization Form to CastleBranch** - this form can be downloaded from the [General On-Boarding Requirements](#) page on the BMS Labs website, and should be uploaded no later than **July 31st**
- Upload a copy of your current health insurance card or proof of coverage to CastleBranch** – This should be completed no later than **July 31st**
- Complete the Bloodborne Pathogens online training and upload a copy of your certificate to CastleBranch** – This is completed through MediaLab, and your certificate of completion should be uploaded no later than **July 31st**
- Complete the HIPAA online training and upload a copy of your certificate to CastleBranch** – This is completed through MediaLab, and your certificate of completion should be uploaded no later than **July 31st**
- Schedule a physical exam** – Physical Examination must be completed within 12 months of the start clinical rotations (after November 1, 2022). If an exam was recently performed, you may ask your physician if they will retroactively complete the required form and not perform another physical examination. If you immunizations are not accepted or up to date, you should notify them of any additional vaccinations or titer testing that will need to be completed. You must download the Physical Examination and Health Status Assessment form from the [General On-Boarding Requirements](#) page on the BMS Labs website and bring it to the exam to be filled out by the healthcare provider that is examining you. This form must be uploaded to CastleBranch under the Physical Exam requirement once it's completed.
- Schedule a Tuberculosis Test to be completed on or after August 1st** – You may need your healthcare provider to order this testing, so it may be easiest to schedule this along with your physical exam. The Quantiferon TB gold blood test is the most common TB test that students choose due to convenience, but more information on TB testing can be found on the BMS Labs website, or on the Physical Examination Health Status Assessment form. TB testing must be completed within 90 days of clinical start date if rotating with Froedtert Health, or within 12 months if rotating with any other sites.
- Schedule a Drug Screen to be completed on or after August 1st** – The cost of the drug screen is included with your CastleBranch account. You must print a copy of the form provided to you by CastleBranch and bring it to one of the Quest locations listed on the form. They do accept walk-in appointments, but it is recommended you call your preferred site and schedule an appointment if they recommend. The drug screen must be completed within 90 days of clinical start date if rotating with Froedtert Health, or within 12 months if rotating with any other sites.

Tasks to complete in August

The following tasks must be completed on or after August 1st if completing rotations with Froedtert Health (Froedtert Menomonee Falls, Froedtert West Bend, Holy Family memorial Medical Center, and Wisconsin Diagnostic Laboratories).

If you are rotating with any other organization, the requirement is that these are done within 12 months of your clinical start date. If rotating with any site not listed above, you may complete these any time (i.e. June, July, or August).

Complete the Drug Screen at a Quest Diagnostics location – You must print a copy of the form provided to you by CastleBranch and bring it to one of the Quest locations listed on the form. Results for the drug screen will automatically be uploaded to CastleBranch once completed. If you receive a positive result, notify Brad and Zac immediately to discuss. This should be completed no later than **August 31st**

Complete the Physical Exam and upload the Physical Examination and Health Status Assessment Form to CastleBranch - this form can be downloaded from the [General On-Boarding Requirements](#) page of the BMS Labs website, and should be brought to the healthcare provider that is performing your physical exam. If you have recently completed a Physical Exam, you can contact your healthcare provider to see if they will retroactively fill out the form without performing another examination. The completed form should be uploaded to CastleBranch no later than **August 31st**

Complete a Tuberculosis test and upload your results to CastleBranch – You may complete a TB blood test (i.e. Quantiferon TB Gold), or TB skin test. The blood test only requires one visit, but may be more expensive. If a skin test is chosen, you must complete a 2-step skin test. This 2-step version requires two separate TB skin tests, performed 1-3 weeks apart, which will result in four total visits to your provider. Once completed, a copy of your test results should be uploaded to CastleBranch no later than **August 31st**

Task to complete in August/September

Receive your annual Influenza vaccination and upload documentation to CastleBranch – Annual Influenza vaccinations are typically released in August or September. All sites require that you receive a vaccination for the current flu season, so you should watch to see when these become available, and schedule your vaccination as soon as they are released. Once completed, documentation should be uploaded to your CastleBranch account no later than **September 15th**

NOTE: Students rotating with **ACL Laboratories** will be required to fill out an additional Influenza Vaccine Verification Form, which is available on the Advocate Aurora Health On-Boarding Instruction page. Students rotating with ACL should bring this form along with them when they receive their influenza vaccine and have it filled out by whoever administers that vaccination, and a copy of this form must be submitted to Brad (you will not submit this form to CastleBranch).